



**VOICE  
ANALYTICS**

## REPORTING

QUICK REFERENCE

**MOMENTUM**  
T E L E C O M

POWERED BY **AKIXI**

# CONTENTS

<b>Introduction</b>	<b>3</b>
<b>Reporting</b>	<b>4</b>
Overview	4
Reporting Portal Overview	4
My Reports List (Legend 1)	5
Add Report Button (Legend 8)	5
Active Report Tabs (Legend 2)	5
Report Transitioning Feature (Legend 3)	5
The Report Toolbar (Legend 5)	6
Wallboards	7
Extension Lists	8
Unreturned Lost Call List	9
Historic Call List	9
Calls By ½ Hour Interval	9
Filtering	10
General	10
Quick Device Filtering	10
Hunt Group Filtering	10
Scheduling Reports	11
Call Control	11
Charting	11
<b>Feature Summary By Product Type</b>	<b>12</b>
Report Styles	12
Report Features	13

# INTRODUCTION

This document is designed for users as a quick-start guide to reporting functionality. You can use this document to quickly learn how to start using reports in order to view call and ACD statistics for your telephony environment.

# REPORTING

## Overview

This document is a short introduction explaining how to get started running reports within the Service.



### Tip

An in-depth description for all reporting features is contained within the Service's online help system, which can be accessed by either pressing F1 or by left-clicking the "Help" link found at the bottom of all the web pages.

To learn more about all features in detail, start reading the online documentation from the "Reporting" section, which can be displayed by clicking this particular heading within the Contents area of the online Documentation Portal.

## Reporting Portal Overview

To access your reports, click on the Reporting tab found on the Welcome page after signing into the Service with your user credentials. The main areas of the Reporting Portal are shown below:

The screenshot displays the Reporting Portal interface with the following numbered callouts:

- 1 Report List:** A sidebar on the left containing a list of report categories such as ACD Activity Log, ACD Agent List, and Active Call Log.
- 2 Active Report Tabs:** A row of tabs at the bottom of the main content area, including Desktop Workload, Calls By Day, Extension List, ACD Agent List (which is currently active), and Hunt Group List.
- 3 Report Transition Status Area:** A small status area at the bottom right of the interface.
- 4 Active Report Area:** The main central area displaying a detailed report table.
- 5 Report Toolbar:** A toolbar at the top of the report table with icons for various actions.
- 6 Clickable Column Headers (Most Reports):** The column headers of the report table, which are highlighted in red.
- 7 Call Control Toolbar Buttons:** A set of buttons on the right side of the report table for call control functions.
- 8, 9, 10:** Additional callouts pointing to specific report filters and controls on the left sidebar.

S	Agent	Description	In	In Ans	Out	Out Ans	Adv	ACD State	In State For	On Duty For	Dev At	Tot Tlk	Avg Tlk
315	Lee Brining		184	104	0	0	40	S/Out	00:10:20	00:00:00		02:49:14	00:01:17
508	Henry Simpson		181	94	0	0	10	S/Out	01:33:56	00:00:00		02:53:29	00:01:07
523	Julian Evans		151	50	0	0	90	S/Out	00:13:23	00:00:00		02:29:26	00:01:01
509	James Charter		146	88	0	0	47	Busy/A	00:03:24	00:24:00	100	02:30:34	00:01:43
517	John Bennett		147	88	0	0	42	Busy/O	00:02:29	00:35:43	124	02:12:55	00:01:30
519	James Langley		142	91	0	0	22	Alert/A	00:00:06	01:01:04	104	02:27:13	00:01:43
512	Julie Watts		137	85	0	0	34	Avail	00:00:04	00:04:00	111	02:14:58	00:01:37
524	Derek West		129	77	0	0	38	S/Out	00:12:38	00:00:00		02:08:46	00:01:40
513	Katrina Sandings		129	70	0	0	26	S/Out	00:14:15	00:00:00		01:54:24	00:01:38
525	Lorna Jones		128	80	0	0	36	N/A	00:00:06	00:23:18	100	01:58:43	00:01:29
506	Anna Smithson		128	75	0	0	36	Busy/A	00:00:04	00:00:16	100	00:13:00	00:00:00
530	Pauline Tremby		127	76	0	0	38	Busy/O	00:00:38	00:10:51	119	01:55:23	00:01:31
511	Jason Bental		126	83	0	0	24	S/Out	00:06:09	00:00:00		02:32:56	00:01:50
503	Shirley Collins		126	80	0	0	30	S/Out	00:10:51	00:00:00		01:50:22	00:01:26
512	Tess Johnson		121	89	0	0	33	S/Out	00:05:06	00:00:00		02:22:50	00:01:26
515	Alan Harvey		117	83	0	0	24	S/Out	02:08:38	00:00:00		02:09:43	00:01:33
502	Bob Conway		107	67	0	0	27	W/V	00:00:02	00:00:06	114	02:10:00	00:01:56
501	Tim Kaddif		107	74	0	0	24	N/A	00:00:19	00:11:31	127	02:02:23	00:01:29
510	Erin Burley		103	57	0	0	30	S/Out	00:29:54	00:00:00		01:41:48	00:01:47
506	Christine Jones		102	57	0	0	36	Busy/A	00:00:32	00:11:00	100	00:26:14	00:00:00
514	Lee Holmes		90	51	0	0	27	S/Out	00:22:29	00:00:00		01:43:30	00:01:41
510	Daniel Webb		86	59	0	0	19	S/Out	00:23:28	00:00:00		01:29:15	00:01:29
507	Thomas Jackson		86	55	0	0	30	Busy/A	00:03:44	00:13:04	100	00:06:58	00:00:00
504	Fay McDermott		80	50	0	0	22	S/Out	00:29:23	00:00:00		01:30:43	00:01:33
505	Jack Myers		62	44	0	0	13	DND	00:00:04	00:10:14	109	01:22:34	00:01:32
507	Simon Phillips		60	40	0	0	12	Busy/A	00:03:50	00:00:00	100	00:10:00	00:00:00
			3101	1921	0	0	822					52:56:33	00:01:39

### My Reports List (Legend 1)

The "My Reports" list contains a set of pre-defined reports which you are able to configure according to your requirements. You can open or close this area by using the button at the top-right of the list's title area:



When the " My Reports" list is fully shown you can click this button to collapse it, which is useful in order to maximize the available horizontal viewing area used for displaying reports.



When shown collapsed, click this button to fully expand the "My Reports" list.

### Add Report Button (Legend 8)



Click this button in order to add a new report. This immediately displays the Report Properties windows where you can choose the style of the report, additionally configure filtering and other report settings, before clicking the OK button to actually save and open the newly created report within the "Active Report Tabs" area.

### Active Report Tabs (Legend 2)

The "Active Report Tabs" list shows a tab for every currently open (run) report. The tabs allow you to specifically select which report is currently being shown within the "Active Report" area by left-clicking the corresponding tab. The currently displayed report is shown highlighted, whereas all the other tabs are colored grey. You can also drag and drop a "Report Tab" to change its overall display order within the "Active Report Tabs" area.

### Report Transitioning Feature (Legend 3)

The "Reporting Portal" supports the automatic display switching of active reports. This feature automatically cycles through all open reports in the same sequence that they are listed within the "Active Report Tabs" area and displays each report for a defined interval. Left-clicking the transitioning status area icon (bottom-right of the Reporting Portal) toggles whether the report display transitioning feature is turned on or off.

This is a useful feature for when there is a requirement to continuously display several different reports on a Smart TV or projector



## The Report Toolbar (Legend 5)



The Report Toolbar is shown for the current open report and allows you to customise how the report is displayed. Please be aware that the display may differ when you run reports on tablets and mobile devices.



The "Change Report" button displays the "Report Properties" window and allows you to modify the report. Examples of these modifications include applying filters, scheduling, setting alarms, and also excluding call information that is not required to be viewed within the report.



This button allows you to immediately create and view a PDF or HTML view of the report which can be printed. Typically, this is used for ad hoc usage although the report scheduling feature can also be used to deliver reports as a PDF via e-mail



This button allows you to create a snapshot of the reporting screen which can be useful in real-time reports.



This feature allows you to extract a CSV file for the currently viewed report. This provides report data in a useful format for importing into other applications such as a spreadsheet and/or database in order to perform further analysis or charting outside of the product.

### Device(s) Filter

The "Device Filter" allow you to filter reports by particular hunt group or by extension devices. The drop down box allows you to select the relevant devices and/or extension users, or alternatively you can add content to the free text box by using commas. It is also possible to group sequential numbers using the dash symbol, e.g. "012345600200, 012345600300-012345600305, 012345600328".



By clicking the "refresh" button the report can be immediately updated if any relevant changes have been applied using filters.

### Zoom Level

The "Zoom Level" controls the size of the display for non-Wallboard reports. This can be useful if you wish to increase the size of the data being displayed. Alternatively various browsers may require the size of the report to fit neatly in the desktop viewing area.



The "Tile Arrangement" button allows you to customize wallboard reports in order to switch it into chart viewing mode. Please be aware charting is only available within PLUS and PRO reporting.



This feature allows non-Wallboard reports to be viewed as either a detailed table, one of the two BLF views, or as a chart. Again, the charting feature is only available with the PLUS and PRO products.



The date/time filter allows you to customize the period the corresponding report is run across. This can be set to real-time or other historic time frames.



This button closes an active report. This will not stop the reports from being scheduled, but closed reports are not included within the transitioning (automatic report display switching) feature if enabled.

Additionally if you hover the mouse icon over an "empty" area of the "Report Toolbar", a pop-up tooltip will appear that summarizes the duration and filter setting(s) that are currently applied to the corresponding open report.

## Wallboards



This report is best used in real-time display and provides statistics in large individual tiles. Alarms can be incorporated in each tile providing thresholds/parameters have been met. The Wallboard provides a clear overview of the business's performance based on the users being monitored. The individual tiles can be customized to display information as numerous dashboard graphics such as speedometers, simple text or fuel gauges.

The Wallboard is only available with PLUS or PRO reporting. Certain statistics within the Wallboard report are only available within PRO reporting, E.g. ACD agent statistics as shown below:

Product Levels	PLUS	PRO
Real Time Reporting	✓	✓
Alarms	✓	✓
Historical Reporting	✓	✓
Scheduling	✓	✓
*ACD Statistics		✓
DND Statistics		✓
Not Available Codes		✓
*ACD Group Analytics		✓

\*ACD Statistics Require ACD Agent Subscriptions

## Extension Lists

S	Device	Description	In	In Ans	Out	Out Ans	Adv	Tot Tlk	Avg Tlk	Calls	Tel No	Type/Dir	UnAns Time	Talk Time	Acc Code
129	Tony Verbeten		180	118	108	98	45	03:21:02	00:01:42	0					
128	Alan Fulbrook		144	92	74	50	34	02:36:58	00:01:42	0					
127	Oscar Higuera		148	100	96	56	39	02:51:54	00:01:43	0					
126	Jayden Hayhurst		183	114	113	80	50	03:02:57	00:01:36	0					
125	Matthew Rogers		125	82	99	48	34	02:28:23	00:01:48	1	104	Int'n	00:00:14	00:00:36	
124	Sophie Baxter		74	55	64	50	15	01:39:18	00:01:48	0					
123	Callum McQueen		77	50	61	50	19	01:27:22	00:01:44	0					
122	Tyler Sward		93	61	98	76	22	01:49:08	00:01:47	0					
121	John Gooley		138	85	79	44	35	02:18:25	00:01:36	1	03678789043	Ext'n (ACD)	00:00:17	00:00:06	666
120	Olivia O'Grady		170	96	56	39	56	02:13:39	00:01:36	0					

This report shows a list of all the individual extension users that are being monitored. Calls statistics are displayed against each user. This report is typically used to monitor the performance of teams. The extension list does not show call statistics on hunt groups or trunk devices. However, the report can be filtered by a hunt group device number in order to automatically display only the monitored extension members contained within that particular hunt group, as configured on the relevant Service Provider's platform.

This report can also be displayed in BLF view.

The Extension List report also supports dynamic row highlighting when run in real-time. The below table demonstrates what each color represents.

Colour	Description
None	The corresponding device is idle or it is off-hook where it is just starting to make a new outbound call.
Pale yellow	The device is either being alerted by a call, or is making an outbound call that isn't answered yet.
Green	The device is currently busy on an answered call.
Blue	The device isn't currently involved in any active calls and is currently set to reject inbound callers. The device is either set to forward inbound calls to another location, or is set in do-not-disturb (DND) state. Note that in BroadSoft BroadWorks telephony environments, the DND state of the underlying Extension User account is specifically shown by the application, as opposed to the "local" DND state at the corresponding phone endpoint.
Dimmed text	The device is out-of-service probably because the device is unplugged or not properly connected to the telephone system. Alternatively, a previous request to monitor the device on the telephone system failed, which is usually due to an incorrect or expired monitor password being set against the device for telephone systems that specifically require it.



## Unreturned Lost Call List

S	Started (Dist)	Ended -	Seg	TelNo (Clg)	Dev (Clg)	TelNo (Clg)	Dev (Off)	Dev Name (Off)	Ring (Dist)	Returned At	Type	Dev (Last)
✓	10/09/2015 15:15:34	15:25:54	1/2	00349506336	405	01234567405	103	Megan Jones	00:00:42	10/09/2015 15:50:09	ExtIn	405
✓	10/09/2015 15:33:55	15:40:31	2/2	00370737428	401	01234567401	103	Megan Jones	00:00:35	10/09/2015 15:45:08	ExtIn	401
✓	10/09/2015 15:43:38	15:43:54	1/1	00349506036	405	01234567405	126	Joyden Haywood	00:00:16	10/09/2015 15:50:29	ExtIn	
✓	10/09/2015 15:44:14	15:44:44	1/2	02086722088	402	01234567402	120	Olivia O'Grady	00:00:30	10/09/2015 15:45:24	ExtIn	402
✓	10/09/2015 15:45:33	15:49:45	1/1	05050972523	401	01234567401	116	Adam Dixon	00:00:12	10/09/2015 16:12:57	ExtIn	
✓	10/09/2015 15:50:15	15:50:22	1/1	01210102516	401	01234567401	100	Lesley Stone	00:00:07	10/09/2015 16:10:54	ExtIn	
✓	10/09/2015 15:51:36	15:51:28	1/1	00423995447	112	01234567112	112	Benjamin Ford	00:00:12	10/09/2015 16:01:43	ExtIn	
✓	10/09/2015 15:52:36	15:52:46	2/2	01240012189	401	01234567401	104	Ellie Berry	00:00:30	10/09/2015 15:54:41	ExtIn	401
✗	10/09/2015 15:54:53	15:54:59	1/1	00349506036	402	[Non DDI]	115	Ryan O'Rourke	00:00:06		ExtIn	
✓	10/09/2015 15:55:12	15:55:23	1/1	03678789943	119	01234567119	110	Max Norton	00:00:06	10/09/2015 16:05:14	ExtIn	

This is a useful report that displays a list of external inbound abandoned calls, where either the distant calling party has either not yet received a return call, or has not successfully called back in again and been answered by an internal extension user.

When run in real-time, this report shows new abandoned calls dynamically. Additionally, callers are automatically highlighted green when they have either been called back successfully with a return call, or the external party themselves calls back in again and is answered by an extension user.

Calls received by external parties withholding their CLI or CallerID are not shown within the report.

## Historic Call List

This report type displays a historic list of call records for call segments that have already ended. The report may display multiple lines for the same call, which depict the segments of call. Generally, this will occur when the call is passed between various parts of the phone system e.g. an auto attendant onto a hunt group then through to voicemail. The stage of a call is always indicated with a segment number with the final leg being shown as 1/1, 2/2 or 3/3 etc.

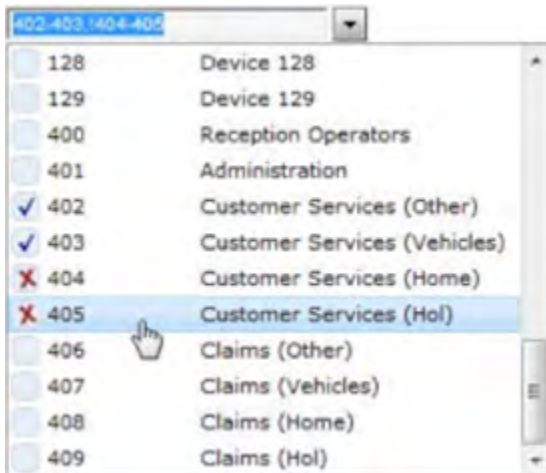
## Calls By ½ Hour Interval

Interval -	In	In Ans	In Abnd	OvrFd Off	Out	Out Ans	Max Wait	Avg Wait
00:00:00 - 00:29:59	90	73	17	0	0	0	00:00:54	00:00:23
00:30:00 - 00:59:59	90	71	19	0	0	0	00:01:43	00:00:24
01:00:00 - 01:29:59	90	76	14	0	0	0	00:01:24	00:00:23
01:30:00 - 01:59:59	90	74	16	0	0	0	00:01:13	00:00:21
02:00:00 - 02:29:59	90	78	12	0	0	0	00:00:49	00:00:25
02:30:00 - 02:59:59	90	77	13	0	0	0	00:02:51	00:00:26

This report shows calls that have occurred during set half hour intervals. If a report is run for multiple days, the report shows the total of all calls during that time period for that specific half hour. This report style is useful when viewing general call trends over the different times of the day across an entire reporting period.

## Filtering

### General



Filtering can be accessed by selecting “Locational Filtering” within the Filter tab of the Report Properties window. Any report (excluding the “External URL” report type) can be filtered by telephone number, extension device, hunt group device, and/or ACD agent filter.

If you wish to filter multiple agents / devices, this can be achieved by using a comma to separate them or by adding a range by using, E.g. “012345600200, 012345600300-012345600305, 012345600328”. To exclude any devices on your report add an exclamation mark before the extension, E.g. “!012345600400, !012345600410-012345600419”.

Using either a left click to include, or a right click to exclude, you can also use the drop down device filter option across your toolbar.

To ensure browser optimization, the Service will always only display the first 150 monitored devices, although this can be increased on a report-by-report basis using the “Content Restriction” settings within the Advanced Tab of the Report Properties window.

### Quick Device Filtering

The “Device(s)” filter option on the Report Toolbar can be used to more easily filter the current report by devices, rather than having to access the Report Properties window every time a device filter needs to be applied or changed.

### Hunt Group Filtering

Normally, filters are used by users within departments that tend to mirror users within a hunt group / call center device on the Service Provider’s platform. A simple way to create these filters is to select the hunt group device number within the device filter. Doing so ensures that any changes that are made to the hunt group itself will be reflected on the users that are being reported.



#### Note

When filtering by hunt group devices, the corresponding report can also be made to automatically include all calls made to/from the associated group member devices. This functionality is turned on by checking on the “Include Calls for Group Device Members” setting within the Advanced Tab of the Report Properties window.

## Scheduling Reports

Any report can be scheduled to run automatically at the time you specify. Reports continue to run even if you are not logged in. All reports can be configured to be automatically run and emailed to you, removing the need to be signed into the application.

Please note that if the “Automatically Calculate Duration...” option is checked within the Advanced settings area, then this will automatically calculate the duration required for the report E.g. current day, previous day, current week, previous week, etc.

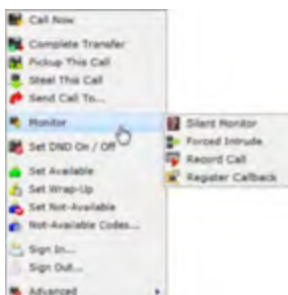


For example, if the option is ticked and the report is being scheduled for a week day within working hours<sup>1</sup>, then the Service will assume that the report is required for the previous day's statistics. Additionally, a daily report run within working hours on a Monday, will by default be run for the previous Friday.

Once this option is specifically unticked (not checked), the report is run for the date/time options currently configured against the report.

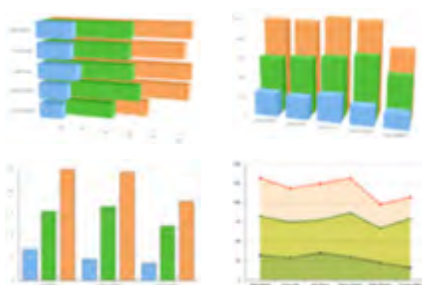
Please note that if you schedule your report for the Weekly option, then the Service will assume that Saturday and Sunday is not part of the working week. Therefore a weekly scheduled report run on a Saturday/Sunday will actually be run for the current week, but the same report scheduled for every Monday, Tuesday, Wednesday, Thursday and Friday will be run for the previous week.

## Call Control



For certain real-time reports, call control is available when appropriately enabled by the Service Provider of the corresponding telephony platform. This can be achieved by left-clicking a row within the report. Please note that the Service mirrors the functionality that the underlying platform provides.

## Charting



Most reports can be configured to be viewed as a chart, and the Service provides a very wide variety of chart types. To learn more about the charting feature, please refer to document “Introduction To Charting”.

<sup>1</sup> “Working hours” is considered before 18:00 in the evening.

# FEATURE SUMMARY BY PRODUCT TYPE

## Report Styles

Please find below a table summarizing the different report styles available within the Service:

Product Levels	LITE	Presence	PLUS	PRO
Historical Call List	✓	✓*	✓	✓
Calls By Half Hour Interval	✓		✓	✓
Calls By Day/Week/Month	✓		✓	✓
Calls By Telephone Number	✓		✓	✓
Unreturned Lost Calls			✓	✓
Extension List			✓	✓
Extension BLF - Presence		✓	✓	✓
Trunk Interface List			✓	✓
Calls By DDI			✓	✓
Active Call List			✓	✓
PLUS Wallboard			✓	✓
External Content (Via URL)			✓	✓
Hunt Group List				✓
DND Extension List				✓
ACD Agent List				✓
ACD Agent BLF		✓		✓
ACD/DND Activity Log				✓
ACD N/A Code Usage				✓
Calls By Account Code				✓
PRO Wallboard				✓

\*It is possible to use the Historical CallList report in Presence but it is automatically filtered by the user's assigned extension device.

## Report Features

Please find below a table summarizing the report features available within the Service:

Product Levels	LITE	Presence	PLUS	PRO
Historical Reporting	✓	✓	✓	✓
Scheduling	✓		✓	✓
Cradle To Grave Reporting	✓		✓	✓
Abandoned Call Recovery	✓		✓	✓
Real Time Reporting		✓	✓	✓
BLF View		✓	✓	✓
Call Control		✓	✓	✓
Alarms			✓	✓
PLUS Wallboard			✓	✓
*ACD Statistics				✓
DND Statistics				✓
*Not Available Codes				✓
*ACD Group Analytics				✓
PRO Wallboard				✓

\*ACD Statistics require ACD Agent subscriptions

## CONTACT US

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, and any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the Account Owner (or an Authorized Contact) submit a ticket or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting for resolution. And always keep your account number handy to help us better assist you when you need us.

### Support by Phone

**1.888.538.3960**

Live phone support is available 24/7 for emergency assistance and speedy resolution.

### Online Support

[www.GoMomentum.com/Support](http://www.GoMomentum.com/Support)

Online options are provided for authorized contacts to access Customer Support quickly and easily, including contact information and helpful tools to submit a minor support request ticket. To assist agents as they help you, include useful information about the issue or question, details of efforts to resolve (if any), methods to reproduce, along with your account number and contact information.

### Documentation and Training

[www.GoMomentum.com/MU](http://www.GoMomentum.com/MU)

Momentum University is an online knowledge base of training and support content that will equip you with all you need to learn about Momentum's best-in-class cloud services and their features. This library includes product user guides, FAQs, quick reference tools, tips, videos, and more - and it is always available as a reference.

Momentum also offers expert live web-based instructor-led training courses for individuals, teams, partners, and organizations which may be requested at any time. Submit a request to your Account Manager or Customer Support, and a friendly representative of the Momentum Corporate Training Team will provide information about course availability and help you to schedule the right training at the best time.

